

STATE OF WASHINGTON

Department of Retirement Systems

**REQUEST FOR PROPOSALS
RFP NO. 06-001-01**

PROJECT TITLE:

SAFR Development

PROPOSAL DUE DATE:

July 3, 2006

EXPECTED TIME PERIOD FOR CONTRACT:

Date of signing thru January 31, 2008

CONSULTANT ELIGIBILITY: This procurement is open to those consultants that satisfy the minimum qualifications stated herein and that are available for work in Washington State.

CONTENTS OF THE REQUEST FOR PROPOSALS

1. Introduction
2. General Information for Consultants
3. Proposal Contents
4. Evaluation and Contract Award
5. RFP Exhibits
 - A. Certifications and Assurances form
 - B. Personal Service Contract with General Terms and Conditions
 - C. Sample Summary Annual Financial Report (SAFR)

TABLE OF CONTENTS

1.	Introduction	2
1.1	Purpose and Background	2
1.2	Objective	2
1.3	Minimum Qualifications.....	2
1.4	Period of Performance.....	2
1.5	Definitions.....	2
1.6	ADA	3
2.	General Information for Consultants	3
2.1	Scope of Services	3
2.2	Project Management & Organization	4
2.3	RFP Coordinator.....	5
2.4	Estimated Schedule of Procurement Activities	5
2.5	Questions & Answers.....	5
2.6	Submission of Proposals	6
2.7	Proprietary Information/Public Disclosure.....	6
2.8	Revisions to the RFP	7
2.9	Minority & Women-Owned Business Participation	7
2.10	Acceptance Period.....	7
2.11	Responsiveness.....	7
2.12	Most Favorable Terms	7
2.13	Contract and General Terms & Conditions	8
2.14	Costs to Propose	8
2.15	No Obligation to Contract	8
2.16	Rejection of Proposals	8
2.17	Commitment of Funds	8
2.18	Billings	8
2.19	Insurance Coverage.....	9
3.	Proposal Contents	10
3.1	Letter of Submittal	11
3.2	Technical Proposal	11
3.3	Management Proposal.....	12
3.4	Cost Proposal.....	13
3.5	Work Samples.....	14
4.	Evaluation and Contract Award	14
4.1	Evaluation Procedure	14
4.2	Evaluation Weighting and Scoring.....	14
4.3	Oral Presentations may be Required	14
4.4	Notification to Proposers	15
4.5	Debriefing of Unsuccessful Proposers.....	15
4.6	Protest Procedure	15
5.	RFP Exhibits	16
	Exhibit A Certifications and Assurances form	
	Exhibit B Sample Personal Service Contract including General Terms and Conditions (GT&Cs)	
	Exhibit C Sample Summary Annual Financial Report (SAFR)	

1. INTRODUCTION

1.1 PURPOSE AND BACKGROUND

The Washington State Department of Retirement Systems, hereafter called "AGENCY," is initiating this Request for Proposals (RFP) to solicit proposals from firms interested in participating on a project to develop the agency's Summary Annual Financial Report.

The AGENCY creates and distributes a version of its technical Comprehensive Annual Financial Report (CAFR) that is known as the Summary Annual Financial Report (SAFR). This report is mailed to all retirement system members and retirees the end of December. The next mailing will be in late December 2006.

The SAFR includes information provided by the AGENCY and by the Office of the State Actuary and the Washington State Investment Board.

1.2 OBJECTIVE

To ensure the information provided in the Summary Annual Financial Report is presented clearly, appropriately and effectively for the publication's audience.

1.3 MINIMUM QUALIFICATIONS

The Consultant must be a professional communications and/or graphic design firm, licensed to do business in the State of Washington.

1.4 PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin the date of signing and to end by January 31, 2008. Amendments extending the period of performance, if any, shall be at the sole discretion of the AGENCY.

The AGENCY reserves the right to extend the contract for up to three additional one-year periods.

1.5 DEFINITIONS

Definitions for the purposes of this RFP include:

AGENCY – The Department of Retirement Systems (DRS) is the AGENCY of the State of Washington that is issuing this RFP.

Consultant – Firm submitting a proposal in order to attain a contract with the AGENCY.

Contract manager – The individual designated by DRS to direct work under this contract and act as the approval authority for all things related to this contract.

Contractor – Individual or company whose proposal has been accepted by the AGENCY and is awarded a fully executed, written contract.

Proposal – A formal offer submitted in response to this solicitation.

Request for Proposals (RFP) – **Formal procurement document in which a service or need is identified**

2. GENERAL INFORMATION FOR CONSULTANTS

2.1 SCOPE OF SERVICES

The information in this section pertains to tasks, deliverables and schedule of work through January 31, 2007. The tasks, deliverables and schedule of work for the second year of the contract (February 1, 2007 through January 31, 2008) will be substantively the same.

The contractor will provide the graphic design and Web services described within this document, subject to review and approval of the DRS Communications Director as to the accomplishment of the tasks/deliverables outlined herein. Content will be determined and written by the AGENCY. Design and format of the report will be determined collaboratively between the AGENCY and the contractor. The cover design will also be used as the cover design for the Comprehensive Annual Financial Report. The contractor will convert the print version of the Summary Annual Financial Report (SAFR) to html format for the AGENCY web site. The AGENCY will separately contract with a print firm for SAFR printing services.

The SAFR includes the following elements, with substantial use of graphics:

- Introductory message
- Description of pension system policymakers
- Summary descriptions of current plans
- Summary financial statements
- Investment summary
- Membership profile
- Highlights of the year

TASKS, DELIVERABLES AND SCHEDULE

The Contractor's tasks will include, but are not limited to:

- A. Reviewing the most recent Comprehensive and Summary Annual Financial Reports and meeting with DRS staff to finalize the schedule and determine graphic design needs and direction.
 - Deliverable: Approved document covering schedule, graphic design needs and direction.
 - Due date: *Within two weeks of contract signing*
- B. Meeting with DRS staff to present two to three options for summary report design
 - Deliverable: Presentation of design options
 - Due date: *9/11/06*
- C. Preparing layout, based on selected design approach, and presenting to DRS for approval
 - Deliverable: Present proposed layout
 - Due date: *9/25/06*

- D. Determining paper stock, ink colors, stock photography and other publication elements. Completing layout revisions (based on DRS feedback), making adjustments and presenting to DRS for approval.
Deliverable: Approved final layout
Due date: 10/9/06
- E. Converting information supplied by DRS to charts and graphs.
Deliverable: Finalized and approved charts and graphs
Due date: 11/30/06
- F. Presenting completed piece to DRS for final approval.
Deliverable: Finalized and approved SAFR
Due date: 12/8/06
- G. Finalizing art for printer.
Deliverable: Finalized art, prepared for and delivered to printer
Due date: 12/15/06
- H. Performing press check.
Deliverable: Press check
Due date: By 12/29/06 (*depending on printer's schedule*)
- I. Converting final version of report to html format for the DRS Web site. This work includes: Creating a navigational header which incorporates a color palette, font standards and photography similar to the printed report; converting charts to graphics and creating tables for numbers related to charts; back-end programming, ensuring ADA compliance; proofing; ALT tags; ensuring browser compatibility through testing; and overall project management.
Deliverable: Approved html version of report, tested and then posted on DRS Web site.
Due date: 12/29/06

2.2 PROJECT MANAGEMENT AND ORGANIZATION

The majority of work will be conducted in Olympia, Washington. The contractor may perform required work off-site, using the contractor's equipment, however the contractor will be required to be on-site, use the AGENCY's facilities, and interact with AGENCY employees to the extent necessary to fulfill the contract requirements. The contractor is responsible for his or her own work schedule, although the AGENCY can require the contractor's attendance at specified meetings.

The contractor must be available as a resource to AGENCY employees when required and will have access to AGENCY staff for technical expertise and current system knowledge. The contractor will not supervise AGENCY staff.

The contractor may, during the course of the execution of the contract, provide services to other clients if those services: 1) Are not a conflict of interest with AGENCY work, as detailed under the general terms and conditions of the eventual contract; and 2) Do not interfere with the contractor's completion of the tasks and deliverables identified in this document in a timely manner.

AGENCY staff will provide guidance and review to the contractor regarding progress toward completion of the task/deliverables identified in this statement of work.

The AGENCY Communications Director will act as manager of the contract for the AGENCY and will be responsible for accepting the deliverables and approving billings submitted by the contractor.

All materials resulting from the contract will be for the sole use of the AGENCY and will become the AGENCY's property.

2.3 RFP COORDINATOR

The RFP Coordinator is the sole point of contact in the AGENCY for this procurement. All communication between the Consultant and the AGENCY upon receipt of this RFP shall be with the RFP Coordinator, as follows:

Name	Adisa Muse
Mailing Address	PO Box 48380
	Olympia, WA 98504-8380
Physical Address	6835 Capitol Blvd
	Tumwater, WA 98501
Phone Number	360-664-7214
Fax Number	360-753-3166
E-Mail Address	adisam@drs.wa.gov

Any other communication will be considered unofficial and non-binding on the AGENCY. Consultants are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Consultant.

2.4 ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue Request for Proposals	June 2, 2006
Question and answer period	June 2 – 23, 2006
Proposals due	4:30 PM, July 3, 2006
Evaluate proposals	July 5 – 11, 2006
Conduct oral interviews with finalists	Week ending July 21, 2006
Announce “Apparent Successful Contractor” and send notification via fax or e-mail to unsuccessful proposers	July 28, 2006
Hold debriefing conferences (if requested)	August 1 - 2, 2006
Protest period	August 1 - 8, 2006
Negotiate contract	August 10 - 11, 2006
File contract with OFM (if required)	August 18, 2006
Begin contract work	August 21, 2006

The AGENCY reserves the right to revise the above schedule.

2.5 QUESTIONS AND ANSWERS

Consultants may submit written questions to the AGENCY during the question and answer period. The AGENCY will respond to all questions by posting the questions and the answers on the AGENCY website within five working days of receipt. The questions and answers will be accessible from http://www.drs.wa.gov/administration/rfp/current_rfps/0600101/default/htm. The AGENCY shall be bound only to written answers to questions.

2.6 SUBMISSION OF PROPOSALS

Consultants are required to submit four (4) paper copies of the proposal. Two paper copies must have original signatures and the other two may have photocopied signatures. The proposal, whether mailed or hand delivered, must arrive at the AGENCY no later than 4:30 p.m., local time, on July 3, 2006.

The proposal is to be sent to the RFP Coordinator at the address noted in Section 2.3. The envelope should be clearly marked to the attention of the RFP Coordinator.

Consultants mailing proposals should allow normal mail delivery time to ensure timely receipt of their proposals by the RFP Coordinator. Consultants assume the risk for the method of delivery chosen. The AGENCY assumes no responsibility for delays caused by any delivery service. Proposals may not be transmitted using electronic media such as facsimile transmission or e-mail.

Late proposals will not be accepted and will be automatically disqualified from further consideration. All proposals and any accompanying documentation become the property of the AGENCY and will not be returned.

2.7 PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

Materials submitted in response to this competitive procurement shall become the property of the AGENCY.

All proposals received shall remain confidential until the contract, if any, resulting from this RFP is signed by the AGENCY and the apparent successful Contractor; thereafter, the proposals shall be deemed public records as defined in RCW 42.17.250 to 42.17.340, "Public Records."

Any information in the proposal that the Consultant desires to claim as proprietary and exempt from disclosure under the provisions of RCW 42.17.250 to 42.17.340 must be clearly designated. The page must be identified as well as the particular exception from disclosure upon which the Consultant is making the claim. Each page claimed to be exempt from disclosure must be clearly identified by the word "Confidential" printed on the lower right hand corner of the page.

The AGENCY will consider a Consultant's request for exemption from disclosure; however, the AGENCY will make a decision predicated upon chapter 42.17 RCW and chapter 143-06 of the Washington Administrative Code. Marking the entire proposal exempt from disclosure will not be honored. The Consultant must be reasonable in designating information as confidential. If any information is marked as proprietary in the proposal, such information will not be made available until the affected proposer has been given an opportunity to seek a court injunction against the requested disclosure.

A charge will be made for copying and shipping, as outlined in RCW 42.17.300. No fee shall be charged for inspection of contract files, but twenty-four (24) hours notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

2.8 REVISIONS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, addenda will be published on the AGENCY website, which is accessible from http://www.drs.wa.gov/administration/rfp/current_rfps/0600101/default/htm. For this purpose, the published questions and answers and any other pertinent information shall be considered an addendum to the RFP and also placed on the web site.

The AGENCY also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

2.9 MINORITY & WOMEN-OWNED BUSINESS PARTICIPATION

In accordance with the legislative findings and policies set forth in chapter 39.19 RCW, the state of Washington encourages participation in all of its contracts by firms certified by the Office of Minority and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation or on a subcontractor basis. However, no preference will be included in the evaluation of proposals, no minimum level of MWBE participation shall be required as a condition for receiving an award, and proposals will not be rejected or considered non-responsive on that basis. Any affirmative action requirements set forth in federal regulations or statutes included or referenced in the contract documents will apply.

2.10 ACCEPTANCE PERIOD

Proposals must provide 60 days for acceptance by AGENCY from the due date for receipt of proposals.

2.11 RESPONSIVENESS

All proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. The Consultant is specifically notified that failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive.

The AGENCY also reserves the right, however, at its sole discretion to waive minor administrative irregularities.

2.12 MOST FAVORABLE TERMS

The AGENCY reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms the Consultant can propose. There will be no best and final offer procedure. The AGENCY does reserve the right to contact a Consultant for clarification of its proposal.

The Consultant should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or all of the Consultant's proposal. It is understood that the proposal will become a part of the official procurement file on this matter without obligation to the AGENCY.

2.13 CONTRACT AND GENERAL TERMS & CONDITIONS

The apparent successful contractor will be expected to enter into a contract that is substantially the same as the sample contract and its general terms and conditions attached as Exhibit B. In no event is a Consultant to submit its own standard contract terms and conditions in response to this solicitation. The Consultant may submit exceptions as allowed in the Certifications and Assurances section, Exhibit A to this solicitation. The AGENCY will review requested exceptions and accept or reject the same at its sole discretion.

2.14 COSTS TO PROPOSE

The AGENCY will not be liable for any costs incurred by the Consultant in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP

2.15 NO OBLIGATION TO CONTRACT

This RFP does not obligate the State of Washington or the AGENCY to contract for services specified herein.

2.16 REJECTION OF PROPOSALS

The AGENCY reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP.

2.17 COMMITMENT OF FUNDS

The Director of the AGENCY or his delegate are the only individuals who may legally commit the AGENCY to the expenditures of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

2.18 BILLINGS

The CONTRACTOR shall bill the AGENCY at the end of each calendar month for completed tasks and deliverables at the rate(s) agreed upon. Monthly billings must be accompanied by a report indicating tasks and deliverables completed, the dollar amount associated with that task or deliverable and a total for this billing cycle. Billings must be approved by the AGENCY's Contract Manager before payment will be made.

AGENCY will pay CONTRACTOR upon receipt of properly completed invoices, which shall be submitted to the Contract Manager not more often than monthly. The invoices shall describe and document to the AGENCY'S satisfaction a description of the work performed, the progress of the project, and fees. Each invoice will clearly indicate the AGENCY Contract Number.

Payment shall be considered timely if made by the AGENCY within thirty (30) days after receipt of properly completed invoices. Payment shall be sent to the address designated by the CONTRACTOR.

The AGENCY may, in its sole discretion, terminate the contract or withhold payments claimed by the CONTRACTOR for services rendered if the CONTRACTOR fails to satisfactorily comply with any term or condition of this contract.

No payments in advance or in anticipation of services or supplies to be provided under this contract shall be made by the AGENCY.

2.19 INSURANCE COVERAGE

The Contractor is to furnish the AGENCY with a certificate(s) of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

The Contractor shall, at its own expense, obtain and keep in force insurance coverage which shall be maintained in full force and effect during the term of the contract. The Contractor shall furnish evidence in the form of a Certificate of Insurance that insurance shall be provided, and a copy shall be forwarded to the AGENCY within fifteen (15) days of the contract effective date.

Liability Insurance

- A. Commercial General Liability Insurance: The Contractor shall maintain general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than \$1,000,000 per each occurrence. If CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the "each occurrence" limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the "each occurrence" limit. CGL insurance shall be written on ISO occurrence form CG 00 01 (or a substitute form providing equivalent coverage). All insurance shall cover liability assumed under an insured contract (including the tort liability of another assumed in a business contract), and contain separation of insureds (cross liability) condition.

Additionally, the Contractor is responsible for ensuring that any subcontractors provide adequate insurance coverage for the activities arising out of subcontracts.

- B. Business Auto Policy: As applicable, the Contractor shall maintain business auto liability and, if necessary, commercial umbrella liability insurance with a limit not less than \$1,000,000 per accident. Such insurance shall cover liability arising out of "Any Auto." Business auto coverage shall be written on ISO form CA 00 01, 1990 or later edition, or substitute liability form providing equivalent coverage.

Employers Liability ("Stop Gap") Insurance

In addition, the Contractor shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.

Additional Provisions

Above insurance policy shall include the following provisions:

1. Additional Insured. The State of Washington, Department of Retirement Systems, its elected and appointed officials, agents and employees shall be named as an additional insured on all general liability, excess, umbrella and

property insurance policies. All insurance provided in compliance with this contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the State.

2. Cancellation. State of Washington, Department of Retirement Systems, shall be provided written notice before cancellation or non-renewal of any insurance referred to therein, in accord with the following specifications. Insurers subject to 48.18 RCW (Admitted and Regulation by the Insurance Commissioner): The insurer shall give the State 45 days advance notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, the State shall be given 10 days advance notice of cancellation. Insurers subject to 48.15 RCW (Surplus lines): The State shall be given 20 days advance notice of cancellation. If cancellation is due to non-payment of premium, the State shall be given 10 days advance notice of cancellation.
3. Identification. Policy must reference the State's contract number and the agency name.
4. Insurance Carrier Rating. All insurance and bonds should be issued by companies admitted to do business within the State of Washington and have a rating of A-, Class VII or better in the most recently published edition of Best's Reports. Any exception shall be reviewed and approved by the Department of Retirement Systems Risk Manager, or the Risk Manager for the State of Washington, before the contract is accepted or work may begin. If an insurer is not admitted, all insurance policies and procedures for issuing the insurance policies must comply with chapter 48.15 RCW and 284-15 WAC.
5. Excess Coverage. By requiring insurance herein, the State does not represent that coverage and limits will be adequate to protect Contractor, and such coverage and limits shall not limit Contractor's liability under the indemnities and reimbursements granted to the State in this contract.

Workers' Compensation Coverage

The Contractor will at all times comply with all applicable workers' compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable. The State will not be held responsive in any way for claims filed by the Contractor or their employees for services performed under the terms of this contract.

3. PROPOSAL CONTENTS

Proposals must be submitted on eight and one-half by eleven (8 1/2 x 11) inch paper with tabs separating the major sections of the proposal. The four major sections of the proposal are to be submitted in the order noted below:

- A. Letter of Submittal, including signed Certifications and Assurances (Exhibit A to this RFP)
- B. Technical Proposal
- C. Management Proposal
- D. Cost Proposal
- E. Samples of graphic design work

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist the Consultant in preparing a thorough response.

Items in this section marked “mandatory” must be included as part of the proposal for the proposal to be considered responsive; however, these items are not scored. Items marked “scored” are those that are awarded points as part of the evaluation conducted by the evaluation team.

3.1 LETTER OF SUBMITTAL (MANDATORY)

The Letter of Submittal and the attached Certifications and Assurances form (Exhibit A to this RFP) must be signed and dated by a person authorized to legally bind the Consultant to a contractual relationship, e.g., the president or executive director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship. Along with introductory remarks, the Letter of Submittal is to include by attachment the following information about the Consultant and any proposed subcontractors:

- A. Name, address, principal place of business, telephone number, and fax number/e-mail address of legal entity or individual with whom contract would be written.
- B. Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, Chairperson of the Board of Directors, etc.).
- C. Legal status of the Consultant (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists.
- D. Federal Employer Tax Identification number or Social Security number and the Washington Uniform Business Identification (UBI) number issued by the State of Washington Department of Revenue.
- E. Location of the facility from which the Consultant would operate.
- F. Identification of any state employees or former state employees employed or on the firm's governing board as of the date of the proposal. Include their position and responsibilities within the Consultant's organization. If following a review of this information, it is determined by the AGENCY that a conflict of interest exists, the Consultant may be disqualified from further consideration for the award of a contract.

3.2 TECHNICAL PROPOSAL (SCORED)

The Technical Proposal must contain a comprehensive description of services, including the following elements:

- A. Project Approach/Methodology – Include a complete description of the Consultant's proposed approach and methodology for the project. This section should convey Consultant's understanding of the proposed project.
- B. Work Plan – Include all project requirements and the proposed tasks, services, activities, etc. necessary to accomplish the scope of the project defined in this RFP. This section of the technical proposal must contain sufficient detail to convey to members of the evaluation team the Consultant's knowledge of the subjects and skills necessary to successfully complete the project. Include any required involvement of AGENCY staff. The Consultant may also present any creative approaches that might be appropriate and may provide any pertinent supporting documentation.

- C. Project Schedule – Include a project schedule indicating when the elements of the work will be completed and when deliverables will be provided.
- D. Deliverables – Fully describe deliverables to be submitted under the proposed contract.
- E. Outcomes and Performance Measurement – Describe the impacts/outcomes the Consultant proposes to achieve as a result of the delivery of these services, including how outcomes would be monitored, measured and reported to AGENCY.
- F. Risks - Address potential risks associated with this contract. Examples include:

Overall Risks

Define risks you identify as being significant to the success of the project. Include how you propose to effectively monitor and manage these risks, including reporting of risks to the agency's contract manager.

Specific Risks

- 1. Provide a business continuation plan that illustrates how you will monitor and manage through times of low client demand, labor disruption, loss of facility and/or key staff/personnel.
- 2. Outline a proposal for minimizing staff turnover and its impact on the agency's contract management staff.

3.3 MANAGEMENT PROPOSAL (SCORED)

A. Project Management

- 1. Project Team Structure/Internal Controls - Provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors. Provide an organizational chart of your firm indicating lines of authority for personnel involved in performance of this potential contract and relationships of this staff to other programs or functions of the firm. This chart must also show lines of authority to the next senior level of management. Include who within the firm will have prime responsibility and final authority for the work.
- 2. Staff Qualifications/Experience – Identify staff, including subcontractors, who will be assigned to the potential contract, indicating the responsibilities and qualifications of such personnel. Provide resumes for the named staff, which include information on the individual's particular skills related to this project, education, experience, significant accomplishments and any other pertinent information. The Consultant must commit that staff identified in its proposal will actually perform the assigned work. Any staff substitution must have the prior approval of the AGENCY.

B. Experience of the Consultant

- 1. Indicate the experience the Consultant and any subcontractors have in the following areas:
 - a. Graphic design
 - b. Presentation of complex data (e.g., graphs, tables, etc.) in a format easily understood
 - c. Internet design and application
 - d. Pre-press and printing experience

2. Indicate other relevant experience that indicates the qualifications of the Consultant, and any subcontractors, for the performance of the potential contract.
3. Include a list of contracts the Consultant has had during the last five years that relate to the Consultant's ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, fax numbers, and e-mail addresses.

C. References

List names, addresses, telephone numbers, and fax numbers/e-mail addresses of three business references for whom work has been accomplished and briefly describe the type of service provided. The Consultant must grant permission to the AGENCY to contact the references. Do not include current AGENCY staff as references.

D. Related Information (MANDATORY)

1. If the Consultant or any subcontractor contracted with the State of Washington during the past 24 months, indicate the name of the agency, the contract number and project description and/or other information available to identify the contract.
2. If the Consultant's staff or subcontractor's staff was an employee of the State of Washington during the past 24 months, or is currently a Washington state employee, identify the individual by name, the agency previously or currently employed by, job title or position held and separation date.
3. If the Consultant has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as notice to stop performance due to the Consultant's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the Proposer, or (b) litigated and such litigation determined that the Proposer was in default.
4. Submit full details of the terms for default including the other party's name, address, and phone number. Present the Consultant's position on the matter. The AGENCY will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience. If the Consultant has experienced no such termination for default in the past five years, so indicate.

E. OMWBE Certification (Optional)

Include proof of certification issued by the Washington State Office of Minority and Women-Owned Business if certified minority-owned firm and/or women-owned firm(s) will be participating on this project.

3.4 COST PROPOSAL (SCORED)

It is DRS' desire to enter into a fixed price, deliverable-based contract with a Consultant to provide the services requested in this RFP. The proposed fees must be based on the total costs for developing each deliverable.

3.4.1 AWARD NOT BASED ON COST ALONE

The evaluation process is designed to award this procurement not necessarily to the Consultant of least cost, but rather to the Consultant whose proposal best meets the requirements of this RFP. However, Consultants are encouraged to submit proposals that are consistent with state government efforts to conserve state resources.

3.5 WORK SAMPLES (SCORED)

Include samples of graphic design work relevant to the project outlined in this RFP.

4. EVALUATION AND CONTRACT AWARD

4.1 EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. An evaluation team, designated by the AGENCY, will determine the ranking of the proposals.

The AGENCY may select the top-scoring firms as finalists for an oral presentation.

4.2 EVALUATION WEIGHTING AND SCORING

The following weighting will be used to score the proposals and select the finalists for oral presentations, if appropriate:

- Work Samples 40 percent
- Management Proposal 30 percent
- Technical Proposal 20 percent
- Cost Proposal 10 percent

DRS, at its sole discretion, may elect to select the top scoring firms for an oral presentation and final determination of contract award. Commitments made by the Consultant at the oral interview, if any, will be considered binding. If oral presentations are given, the final selection will be based on the combined proposal and oral presentation. Consultants who give oral presentations may be asked to elaborate on the elements of their proposal.

4.4 NOTIFICATION TO PROPOSERS

Firms whose proposals have not been selected for further negotiation or award will be notified via FAX or by e-mail.

4.5 DEBRIEFING OF UNSUCCESSFUL PROPOSERS

Upon request, the AGENCY will schedule and hold a debriefing conference with an unsuccessful Proposer. The request for a debriefing conference must be received by the RFP Coordinator within three (3) business days after the Notification of Unsuccessful Consultant letter is faxed/e-mailed to the Consultant. The debriefing must be held within three (3) business days of the request.

Discussion will be limited to a critique of the requesting Consultant's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of one hour.

4.6 PROTEST PROCEDURE

The protest procedure is available to Consultants who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the Consultant is allowed three (3) business days to file a protest of the acquisition with the RFP Coordinator. Protests may be submitted by facsimile, but should be followed by the original document.

Consultants protesting this procurement shall follow the procedures described below. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to Consultants under this procurement.

All protests must be in writing and signed by the protesting party or an authorized agent. The protest must state the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested should also be included. All protests shall be addressed to the RFP Coordinator.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A. A matter of bias, discrimination or conflict of interest on the part of the evaluator.
- B. Errors in computing the score.
- C. Non-compliance with procedures described in the procurement document or AGENCY policy.

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1) An evaluator's professional judgment on the quality of a proposal, or 2) AGENCY'S assessment of its own and/or other agencies' needs or requirements.

Upon receipt of a protest, a protest review will be held by the AGENCY. The AGENCY director or an employee delegated by the Director who was not involved in the procurement will consider the record and all available facts and issue a decision within five business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

In the event a protest may affect the interest of another Consultant who submitted a proposal, such Consultant will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

The final determination of the protest shall:

- A. Find the protest lacking in merit and uphold the AGENCY's action; or
- B. Find only technical or harmless errors in the AGENCY's acquisition process and determine the AGENCY to be in substantial compliance and reject the protest; or
- C. Find merit in the protest and provide the AGENCY options which may include:
 - 1. Correct the errors and re-evaluate all proposals, and/or
 - 2. Reissue the solicitation document and begin a new process, or
 - 3. Make other findings and determine other courses of action as appropriate.

If the AGENCY determines that the protest is without merit, the AGENCY will enter into a contract with the apparently successful contractor. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

5. RFP EXHIBITS

Exhibit A **Certifications and Assurances form**

Exhibit B **Sample Personal Service Contract including General Terms and Conditions**

Exhibit C **Sample SAFR report**

EXHIBIT A

CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):

1. I/we declare that all answers and statements made in the proposal are true and correct.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.
3. The attached proposal is a firm offer for a period of 60 days following receipt, and it may be accepted by the AGENCY without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
4. In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)
5. I/we understand that the AGENCY will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of the AGENCY, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly to any other Proposer or to any competitor.
7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
8. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

Signature of Proposer

Title

Date